



MB-910T00: Microsoft Dynamics 365 Fundamentals (CRM)

Course ID #: 7000-604-ZZ-Z

Hours: 14

Course Content

Course Description:

This course will provide you with a broad introduction to the customer engagement capabilities of Dynamics 365. You will become familiar with the concept of customer engagement, as well as each of the customer engagement apps, including Dynamics 365 Marketing, Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, and the customer relationship management (CRM) capabilities of Dynamics 365 Project Operations. This course will include lecture as well as hands-on labs.

At Course Completion:

Students will be able to:

- Describe the capabilities and functionality of Dynamics 365 Marketing
- Describe the capabilities and functionality of Dynamics 365 Sales
- Describe the capabilities and functionality of Dynamics 365 Customer Service
- Describe the capabilities and functionality of Dynamics 365 Field Service
- Describe the capabilities and functionality of Dynamics 365 Project Operations (CRM)

Prerequisites:

Learners should have a fundamental understanding of customer engagement principles and business operations. An understanding of cloud computing is helpful but isn't necessary.

Target Student:

People in different roles and at various stages in their careers can benefit from this fundamentals course. This includes IT professionals, business stakeholders and others who want to be exposed to the customer engagement capabilities of Dynamics 365, students, recent graduates, and people changing careers who want to leverage Dynamics 365 to move to the next level.

Topics:

Module 1: Learn the Fundamentals of Dynamics 365 Marketing Lessons

- Get introduced to the Dynamics 365 customer engagement apps
- Examine Dynamics 365 Marketing
- Describe Dynamics 365 Marketing capabilities
- Review Additional Marketing Apps



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Lab : Working with customer engagement apps

Lab : Manage Customers and Activities

Lab : Search and filter data

Lab : Dynamics 365 Marketing Capstone Lab

- Create a marketing email
- Create a Segment in Dynamics 365 Marketing
- Create a Customer Journey

Module 2: Learn the Fundamentals of Dynamics 365 Sales

Lessons

- Explore Dynamics 365 Sales
- Manage the sales lifecycle with Dynamics 365 Sales
- Review additional sales apps

Lab : Dynamics 365 Sales Capstone Lab

- Create and qualify a Lead
- Manage a sales Opportunity

Module 3: Learn the Fundamentals of Dynamics 365 Customer Service

Lessons

- Examine Dynamics 365 Customer Service
- Describe Dynamics Customer Service capabilities
- Review additional customer service apps

Lab : Dynamics 365 Capstone Lab

- Create and publish a Knowledge Article
- Manage a support Case through its life cycle

Module 4: Learn the Fundamentals of Dynamics 365 Field Service

Lessons

- Examine Dynamics Field Service
- Generate Work Orders in Dynamics 365 Field Service

- Describe the scheduling capabilities of Dynamics 365 Field Service
- Examine the inventory management capabilities of Dynamics 365 Field Service
- Review the asset management capabilities of Dynamics 365 Field Service

Lab : Dynamics 365 Capstone Lab

- Create a Case and escalate to a Work Order
- Schedule items with Dynamics 365 Field Service

Module 5: Learn the Fundamentals of Dynamics 365 Project Operations (CRM)

- Examine Dynamics 365 Project Operations
- Describe the sales capabilities of Dynamics 365 Project Operations
- Plan projects with Dynamics 365 Project Operations
- Review the resource utilization capabilities of Dynamics 365 Project Operations

Lab : Dynamics 365 Project Operations Capstone Lab

- Create a project-based Lead
- Manage a project-based Opportunity
- Create a Project Quote and Project Estimate